

Amended Third Account Current, Report of Conservator and petition for Its Settlement

DOD: 8/15/13		ALBERT FRANCO , Son and Co-Conservator, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
			Minute Order 3/7/16: Albert Franco represents that he is meeting with Ms. Krause-Cota this afternoon to retain her services. The Court grants one last continuance, indicating that removal and appointment of the Public Guardian is imminent if the issues are not addressed.
Cont. from 012716, 030716		Account period: 6/1/12 – 8/31/13 Accounting: \$121,910.31 Beginning POH: \$ 92,518.86 Ending POH: \$ 90,639.43 (\$639.43 cash plus real property valued at \$89,000.00 and personal property valued at \$1,000.00)	Note: On 4/5/16, Ms. Krause substituted in as counsel for Petitioner; however, nothing further has been filed.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		The following issues remain noted: <u>SEE ADDITIONAL PAGES</u>
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	Reviewed by: skc
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		Reviewed on: 4/11/16
<input type="checkbox"/>	UCCJEA		Updates:
<input type="checkbox"/>	Citation		Recommendation:
<input type="checkbox"/>	FTB Notice		File 1- Kozera

SEE ADDITIONAL PAGES

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Petitioner states he and his sister Patricia Leonard are the duly appointed co-conservators of the person and estate. When their mother died on 8/15/13, she was staying with Patricia. Taking care of a dying parent is very stressful, and after her death, Patricia wanted Petitioner to take care of everything. Petitioner took over paying bills for the residence in Fresno and has been dealing with this conservatorship. Patricia Leonard will not appear regarding this matter and when the conservatorship is dissolved, Petitioner will be the one to petition for the probate estate. Although she has not been formally removed, she asked Petitioner to finish up this case and he agreed.

In the Second Account, two bank accounts were listed. Petitioner closed one of the accounts after the Second Account; therefore, in this report, Petitioner is providing information on the only account he has been using.

Petitioner states the conservatorship technically stopped and the probate estate started when his mother died. He did not account for and deal with the conservatorship estate assets subsequent to her death as stated in the prior declaration because petitioner plans to deal with those assets in the probate estate.

Petitioner states in the prior Examiner Notes, it states he requested termination without distribution of the assets or indicating that an estate has been opened. Petitioner states he did say he would open a probate case. He thought this had to be closed first. Petitioner did not know that assets could be distributed out of the conservatorship estate.

Petitioner states he is not an attorney and there are no funds to hire one. While he knows he is responsible for knowing the rules, he respectfully asks for some guidance. Since he and his sister are the only heirs, if it is not necessary to open a probate case, he would like to know if the house can be distributed from the conservatorship case.

Concerning the other probate notes, Petitioner has amended the accounting and the charges and credits now match and the beginning property on hand now matches the property on hand at the close of the Second Account.

Re Request for Special Notice filed by Leigh Burnside: Petitioner states he originally hired that firm to help recover about \$300,000 that someone stole from the estate prior to the conservatorship. Instead of doing what he hired them to do, they spent about a year and \$90,000 of estate funds in attorney fees for multiple attorneys and paralegals relative to this conservatorship. He fired them and they had the gall to try and come back and collect more attorney fees. He told them if they continued in their effort to get paid for not doing what they were hired to do, he would sue them. Mr. Burnside and his firm (sic) have been gone for several years and have not been noticed. Petitioner objects to having to waste additional time and money keeping them notified when they were fired for non-performance and basically ripping off his mother for \$90,000.

Petitioner states he has not accounted for estate assets subsequent to his mother's death and again respectfully requests that the assets be distributed out of this case or that this case be closed/dismissed so a probate can be opened. The Court could also accept this third account and then have a fourth and final account for the subsequent period. Either way, Petitioner respectfully requests help.

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS:

1. The petition is not verified by Co-Conservator Patricia Leonard. (Although Petitioner states he and his sister agreed that he would finish up the conservatorship, this issue remains noted pursuant to Probate Code §1020.)
2. Although Petitioner revised the summary to balance, no accounting schedules are provided in support of the summary pursuant to Probate Code §1062. Summary and schedules should be completed on the mandatory Judicial Council forms. (Although Petitioner previously provided the bank statements, these are supplemental and are not in a format reviewable by the court.)
3. As previously noted, Petitioner provides an "account current" that ends at the end of the month after the conservatee's death, but does not account for any subsequent period per §2620(b) or request distribution of assets in order to close the conservatorship. In this amended petition, Petitioner requests direction as to how to proceed – whether to open an estate or whether distribution can occur from this conservatorship estate.

While the Court cannot provide legal advice, Examiner notes that if the value of the remaining assets, reappraised at date of death, is under \$150,000.00, Petitioner may be able to use a summary proceeding for distribution to the heirs rather than opening a full probate estate. See Probate Code §13150 et seq. However, this type of proceeding, while simpler, would require some participation by Ms. Leonard. Petitioner may wish to review Form DE-310 (Petition to Determine Succession) along with DE-160, DE-161 (Inventory and Appraisal). Please note that the manner of closing of this conservatorship estate may depend on the proceeding Petitioner intends to use (full probate or summary proceeding), and final account herein according to the Probate Code may still be necessary.

4. Need Notice of Hearing (Mandatory Judicial Council Form GC-020) for this hearing date and proof of service of Notice of Hearing on all relatives at least 15 days prior to the hearing pursuant to Probate Code §§ 1220, 2621, 1460(b)(6). (It appears Petitioner served notice of a prior hearing date that was taken off calendar. Petitioner should have filed this amended petition and thereafter served the Notice of Hearing on all relatives.
5. Request for Special Notice: Petitioner states the law firm did not do what they were hired to do and he fired them. However, Court records indicate that the Co-Conservators were represented by Dowling Aaron from commencement of conservatorship proceeding through the settling of the first account, which also included a petition and order for substituted judgment revoking estate planning documents and powers of attorney. See file for history and details. The Court granted attorney fees and costs of \$42,563.75 on 4/21/11 and \$4,730.25 on 8/23/11.

Substitution of Attorney was filed 8/9/11, and Request for Special Notice was filed 8/25/11. It appears the majority of the fees granted were paid according to the Co-Conservators' Second Account; however, Pursuant to Probate Code §1252, Notice of Hearing with a copy of the petition must be served on the party requesting special notice unless dispensed by the Court. Therefore, notice is required.

SEE ADDITIONAL PAGES

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Note: Petitioner states his bond was waived pursuant to the Court's minute order of 2/21/13; however, as previously noted, the Order Approving Second Account signed by the Court on 2/21/13 states at Paragraph 13 on Page 4: "The Co-Conservators have on file a bond totaling \$181,280 from International Fidelity Insurance Company in connection with their appointment as Co-Conservators, which is sufficient in this estate." This Order clarifies that the bond was not waived or canceled; rather, the current bond was found sufficient at that time to proceed without increase.

Attorney Catherine A. Amador (for Linda K. Babcock)

First and Final Account and Report of Conservator; Petition for Allowance of Fees to Attorney for Conservator; Petition for Distribution

DOD: 2/22/2014	LINDA K. BABCOCK , daughter of Conservatee's wife and Conservator of the Estate appointed on 3/22/2012, is Petitioner.		NEEDS/PROBLEMS/ COMMENTS:
			1. <i>Petition states</i> Conservatee received benefits from the Department of Veteran Affairs from August 2013 until his death in February 2014. Pursuant to Probate Code § 1822(d), if the <i>Petition</i> states the proposed conservatee received benefits from the Veterans Administration, notice shall be mailed to the Office of the Veterans Administration referred to in Probate Code § 1461.5. Need proof of 15 days' mailed service of <i>Notice of Hearing</i> to the Office of the Veterans Administration.
Cont. from	Account period: 3/1/2012 - 9/30/2015		2. <i>Declaration in Support of Attorney Fees</i> appears to charge \$79.50 for communications with Court examiners in violation of Local Rule 7.17(B)(6).
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$164,171.33		
<input checked="" type="checkbox"/> Verified	Beginning POH - \$ 72,815.59		Reviewed by: LEG
<input type="checkbox"/> Inventory	Ending POH - \$ 10,573.92 (all cash)		
<input type="checkbox"/> PTC	Conservator - \$2,700.00 (for 5 hours per month @ \$15/hour; for care prior to move and assistance with move to assisted living; for paying monthly bills; sale of personal property no longer needed; securing Veteran's benefits payments for Conservatee;)		Reviewed on: 4/11/16
<input type="checkbox"/> Not.Cred.			Updates:
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$11,616.25 (partially paid) (per Declaration filed 3/9/2016 for [un-totaled sum of hours] at \$275/hr for services including ex parte petition for temporary conservator, efforts to provide care to Conservatee and his wife at home, coordination with court-appointed counsel including Stipulation; sum of \$9,977.21 was previously paid by Conservator due to error to prevent billing and payment; \$1,611.54 balance remains to be paid;)		Recommendation:
<input checked="" type="checkbox"/> Aff.Mail			File 2- Johansen
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Notc Vet	Bond - \$127,600.00		
<input type="checkbox"/> Pers.Serv.	Petitioner states she proposes to reimburse the Conservatee's account in the amount of \$6,099.95 for expenses that should have been paid from the Estate of FAY JOHANSEN (Conservatee's predeceased wife) for expenses for the home belonging to Conservatee's wife.		
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order	Petitioner requests the Court direct all remaining assets be distributed to the Conservatee's Executor to be distributed according to his Will.		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

3 Miah Morningstar, Ellie Hobson, Lola Aguirre-Hobson (GUARD/P)
Case No. 12CEPR01031

Petitioner: Jackie Aguirre-Bittner (pro per)
 Petitioner: Clinton Bittner (pro per)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 4/18/16	NEEDS/PROBLEMS/COMMENTS:
		JACKIE AGUIRRE-BITTNER , maternal grandmother and CLINTON BITTNER , maternal step-grandfather, are petitioners.	This petition is as to ELLIE and LOLA only. Petitioners were previously appointed guardians of Miah on 1/16/13.
Cont. from		Please see petition for details.	1. Proof of service on paternal grandmother, Susan Osborn does not indicate the Notice of Hearing was served with a copy of the petition as required.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Court Investigator Report filed on 4/11/16	2. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: a. Unknown paternal grandfather b. Oscar Villarreal, maternal grandfather – unless the court dispenses with notice.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/O	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/11/16
			Updates:
			Recommendation:
			File 3- Morningstar/ Hobson/ Aguirre- Hobson

4 Drake Hoffman & Kingston Hoffman (GUARD/P)**Case No. 12CEPR01101**

Guardian: Jonathan Crist (Pro per – Maternal grandfather)

Petitioner: Emilie Megan Crist (Pro per – Mother)

Petition for Visitation

		EMILIE CRIST , mother, is petitioner	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of mailed service 15 days prior to the hearing of the <i>Notice of Hearing</i> for: a. Jonathan Crist (guardian) b. Drake Hoffman (minor)
		JONATHAN CRIST , maternal grandfather, was appointed guardian of the minors on 2/6/2013.	
		<i>See petition for details.</i>	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 4/11/2016
			Updates:
			Recommendation:
			File 4- Hoffman

(1) Proof for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory Commissions

DOD: 6/20/13		BETTY ANN CONNELLY , Mother and Administrator with Full IAEA without bond, is Petitioner. Petitioner is the sole heir and waives accounting. I&A: \$295,528.15 POH: \$42,955.29 (cash) Administrator (Statutory): \$8,910.56 Closing: \$1,000.00 Petitioner states the decedent's real property was sold and the decedent's personal effects were distributed to the heirs to avoid storage expense. Petitioner requests distribution pursuant to intestate succession as follows: Betty Ann Connelly: Entire estate	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 9/14/15:</u> Ms. Connelly requests a continuance to April in order to resolve the creditor's claim, which is from an auto accident case that the decedent was involved in. The Court directs Ms. Connelly to file a written status report at least a week in advance of the 4/18/16 hearing. <u>Note:</u> Petitioner filed a Declaration on 4/8/16 regarding 14CECG01135. <p style="text-align: center;"><u>SEE PAGE 2</u></p>
Cont From 020915, 050415, 091415			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail x		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 7-25-14		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 4/11/16
Updates:
Recommendation:
File 5 – Connelly

Declaration filed 4/8/16 states: Please find attached copy of court paperwork showing Fresno County Court Case No. 14CECG01135, Jacklyn Kurisu v. Regina Connelly, was continued from 1/4/16 to 11/28/16. (Attached is a Stipulation and Order to Continue Trial.)

NEED/PROBLEMS/COMMENTS: The following issues remain noted:

1. Petitioner states at #6 that no claims were filed against the estate; however, a Creditor's Claim was filed on 10/27/14 by Attorney David Milligan for Claimant Jacklyn Kurisu in connection with damages arising out of a motor vehicle accident of \$314,000.00, with reference to Case #14CECG01135. Therefore, need Allowance or Rejection of Creditor's Claim (DE-174) and proof of service pursuant to Probate Code §9250.

Note: If rejected, a creditor has 90 days to act on the rejection.

Note: Pursuant to Probate Code §10954(c), notwithstanding the waiver of accounting by the heir, an unpaid creditor may petition for an accounting.

2. Court records indicate that the Estate of Regina Ann Connelly (presumably Petitioner as Administrator) filed an Answer on 12/14/14 to a complaint in 14CECG01135. Therefore, it does not appear that this estate is in a position to close. Need clarification regarding this matter.
3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1252 and Request for Special Notice filed 10/30/14 on David Milligan (Attorney for Creditor Jacklyn Kurisu)
4. Need Order pursuant to Local Rules 7.1.1.F. and 7.6.1.

Petition for Final Distribution on Waiver of Accounting

DOD: 10/14/13		ALAN W. LOWE , brother/Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Decedent was survived by his mother, Stella L. Lowe (please see the Estate of Stella K. Lowe on page 7). Therefore pursuant to intestate succession, the Estate of Stella L. Lowe is the beneficiary of this estate and not petitioner Alan W. Lowe. 2. #5 of the inventory and appraisal is marked that a property tax certificate is not applicable because the decedent owned no real property in California at the time of death. However the decedent did own real property. Need property tax certificate. 3. Need Allowance or Rejection of Creditor's Claim for California State Board of Equalization. California Rules of Court, Rule 7.401. 4. Property on hand and proposed distribution show the same amount of cash. It appears that the attorney fees have not been deducted from the proposed distribution.	
		Accounting is waived.		
Cont. from		I & A - \$160,339.00		
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$ 57,571.00		
<input checked="" type="checkbox"/>	Verified	(\$22,232.00 is cash)		
<input checked="" type="checkbox"/>	Inventory	Administrator - waives		
<input type="checkbox"/>	PTC	X		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney - \$5,669.17 (statutory)		
<input type="checkbox"/>	Notice of Hrg	N/A		
Aff.Mail		Proposed distribution is to: Alan W. Lowe - \$22,232.00, decedent's 1 2/3 interest in real property and 2005 Chevy Silverado Pick Up.		
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
<input checked="" type="checkbox"/>	Letters			8/13/14
Duties/Supp				
Objections				
Video Receipt				
CI Report				
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
<input checked="" type="checkbox"/>	FTB Notice			
Reviewed by: KT				
Reviewed on: 4/11/16				
Updates:				
Recommendation:				
File 6 - Lowe				

Petition for Final Distribution on Waiver of Accounting

DOD: 11/9/13		ALAN W. LOWE , son/Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 5. #5 of the inventory and appraisal is marked that a property tax certificate is not applicable because the decedent owned no real property in California at the time of death. However the decedent did own real property. Need property tax certificate. 6. Need Allowance or Rejection of Creditor's Claim for AIS Recovery Solutions. California Rules of Court, Rule 7.401.
		Accounting is waived.	
Cont. from		I & A - \$170,799.35	
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$137,798.65	
<input checked="" type="checkbox"/>	Verified	Administrator - waives	
<input checked="" type="checkbox"/>	Inventory	Attorney (statutory) - \$6,123.98	
<input type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	N/A	
Aff.Mail		Distribution, pursuant to intestate succession, is to:	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.		Alan W. Lowe- \$2,048.65, real property and 1993 Ford Thunderbird	
Conf. Screen			
<input checked="" type="checkbox"/>	Letters	8/11/14	
Duties/Supp			
Objections			
Video Receipt			
CI Report			
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
<input checked="" type="checkbox"/>	FTB Notice		
Reviewed by: KT			
Reviewed on: 4/11/16			
Updates:			
Recommendation:			
File 7- Lowe			

Attorney Jeffrey A. Jaech (for Petitioner Ben Kohrman)

**First and Final Account and Report of Personal Representative and Petition
for Its Settlement, for Allowance of Personal Representative's Commissions
for Ordinary Services, for Allowance of Attorneys' Fees for Ordinary and
Extraordinary Services, and for Final Distribution**

DOD: 7/24/2014		BEN KOHRMAN , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petition requests the authority to designate a custody under the California Transfer to Minor's Act for the ~\$80,000.00 in personal property (stock) devised in the Decedent's Will to the minor beneficiary, MARIE KOHRMAN . Probate Code § 3906 states a transfer may be made only if specific requirements are met, one of which is that the transfer must be authorized by the Court if it exceeds \$10,000.00 in value. Court may determine that the non-cash assets may require establishment of a guardianship estate for the minor.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	092614	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Account period: 7/24/2014 – 2/6/2015 Accounting - \$427,905.23 Beginning POH - \$386,832.71 Ending POH - \$341,800.23 (\$218,084.27 cash) Executor - \$11,150.55 (statutory) Attorney - \$11,150.55 (statutory) Attorney X/O - \$2,183.50 (per Declaration filed 3/7/2016; for sale of real property residence; sale of personal effects, tools, farming equipment at auction grossing over \$15,000.00; sale of Auberry property for \$11,500.00; 10.8 hours @ \$395 attorney rate and \$150 paralegal rate;) Costs - \$637.47 (filing fee, lodging will, ex parte petition, overnight delivery, certified copies) Closing - \$5,000.00 ~Please see additional page~	
Reviewed by: LEG			
Reviewed on: 4/12/16			
Updates: 4/14/16			
Recommendation:			
File 8- Riba			

Petitioner states a beneficiary under Decedent's Will, **MARIE KOHRMAN**, is a minor (age 16), and Petitioner proposes to distribute her devise of **~\$80,000.00** to Petitioner as custodian for under the California Uniform Transfer to Minors Act (CUTMA), Probate Code § 3900; Petitioner considers the transfer to custodian in the best interests of the minor, who is Petitioner's daughter, because it will save considerable costs of a guardianship, which would otherwise be needed for only about 19 months until the minor reaches age 18; *Consent of Minor Beneficiary to Distribution to Custodian* was filed 3/7/2016.

Distribution pursuant to Decedent's Will is to:

- **BEN KOHRMAN as custodian under CUTMA for MARIE KOHRMAN, a minor** – cash of **\$3,846.00** (dividends paid by Chevron stock) and **~910** shares of Chevron stock;
- **STUART RIBA** – **\$46,029.05 cash** and ¼ interest in 1969-70 helmet, firearms and cleaning kits, and miscellaneous household furniture and personal effects;
- **SCOTT RIBA** – **\$46,029.05 cash** and ¼ interest in 1969-70 helmet, firearms and cleaning kits, and miscellaneous household furniture and personal effects;
- **MICHELLE RHOTEN** – **\$46,029.05 cash** and ¼ interest in 1969-70 helmet, firearms and cleaning kits, and miscellaneous household furniture and personal effects;
- **MELISSA RIBA** – **\$46,029.05 cash** and ¼ interest in 1969-70 helmet, firearms and cleaning kits, and miscellaneous household furniture and personal effects.

In Re: Jackson White Special Needs Trust Case No. 14CEPR00757

Attorney

Lederman, Gregory J. (of Woodland Hills, CA, for Midlands States Bank – Trustee)

**Second Account and Report of Trustee and Petition for: 1. Ratification of Trustee Fees;
2. Allowance of Periodic Payment of Trustee's Fees; and 3. Allowance of Attorney Fees and
Reimbursement for Costs Advanced**

		MIDLANDS STATE BANK , Trustee without bond, is Petitioner. Account period: 1/1/14 – 12/31/15 Accounting: \$194,286.94 Beginning POH: \$92,640.90 Ending POH: \$125,090.09 (\$6,395.03 cash, securities, annuities) Trustee: \$6,250.05 (Pursuant to Order Approving Compromise, Petitioner was authorized to pay itself monthly periodic payments of trustee fees out of the trust estate. Acting in conformity with the Order, Petitioner paid itself monthly trustee fees in the total sum of \$6,250.05 during this account period. Exhibit D provides the fee schedule and services, including 1.75% up to \$250,000, see table thereafter, minimum \$5,000. Disbursements Schedule indicates payments of \$416.67/month) Former Attorney: \$1,705.69 (\$1,087.50 plus \$618.19 in costs, for 6.5 paralegal hours @ \$150/hr and 0.3 attorney hours @ \$375/hr in connection with the first account. Current Attorney: \$5,140.00 (\$4,327.50 for 17.3 attorney and paralegal hours in preparation of this account itemized at Exhibits F, G, plus \$812.50 for an anticipated 2.5 attorney hours @ \$325/hr for appearance at this hearing. Alternatively, if the matter is recommended for approval and no appearance is required, the attorney will reduce the requested amount by \$812.50 to \$4,327.50.) Costs: \$200.00 (filing this petition) <u>SEE ADDITIONAL PAGES</u>	NEEDS/PROBLEMS/COMMENTS: <u>SEE ADDITIONAL PAGES</u>	
Cont. from 031416				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	2620(c)			
<input type="checkbox"/>	Order			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc Reviewed on: 4/12/16 Updates: Recommendation: File 9- White		

Page 2

Declaration filed 3/28/16 states:

- Title to the vehicle is held by the beneficiary's parents, with the trust listed as lienholder.
- The payment from John Hancock of \$34,500 on 1/9/15 was the payment that was supposed to be received in August 2014; however, payment was delayed due to change of Petitioner's address.
- ING (life insurance on beneficiary's parents) did not have Petitioner's correct address for 2014 and 2015, but used earnings from the insurance policy to pay the premium for those two years. Petitioner has contacted ING to update its contact information and has made payments in the total sum of \$39,000 to pay for the past due premiums and reimburse the earnings. Thus, the policy is still in effect and the payments are current. Petitioner has revised Schedule E Assets on Hand to include the ING policy as an asset of the trust.

Petitioner prays for an order that:

1. Notice of Hearing has been given as required by law;
2. The allegations contained in this petition are true;
3. The total property on hand consists of cash assets of \$6,395.03, securities of \$118,695.40, a 2014 Honda Odyssey valued at \$49,999.66, and the rights to the income streams from the John Hancock and Prudential annuities for a total of ~~\$175,090.09~~ \$125,090.09 (Note: This revised figure excludes vehicle and includes ING policy per the Declaration filed 3/28/16);
4. Ratifies trustee fees paid to Midland States Bank of \$6,250.05 during this account period;
5. Authorizing and directing Petitioner to pay itself, out of the trust estate, periodic payments of compensation on account during the next accounting period for services rendered as trustee, on a monthly basis, pursuant to the fee schedule set forth in the petition;
6. Authorizing and directing payment to The Urbatsch Law Firm, PC, out of the trust estate, the total of \$1,087.50;
7. Authorizing and directing payment to Gregory J. Lederman, Esq., \$5,140.00 or alternatively \$4,327.50 if recommended for approval;
8. Authorizing and directing reimbursement to Gregory J. Lederman, Esq., \$200.00 in costs; and
9. Any other and further orders that the Court deems just and proper.

SEE ADDITIONAL PAGES

Page 3 – NEEDS/PROBLEMS/COMMENTS: The following issues remain noted:

1. \$133.19 of the costs requested by Petitioner's former attorney are for costs considered by the court to be costs of doing business and not reimbursable pursuant to Local Rule 7.17. The Court may disallow reimbursement for the following amounts:
 - Filing service \$56.85
 - FedEx \$19.79
 - Filing service \$56.55
2. Trustee fees were previously authorized to be paid in monthly periodic payments; however, Fresno Superior Court Local Rule 7.19E states when a trust is subject to continuing court supervision, no payment of fees to attorneys, trustees, or others may be made without prior court approval. As such, the Court may require prior Court approval for payment of trustee fees going forward.
3. Need proposed order per Local Rule 7.1.1.F.

Note: If granted, the Court will set a status hearing for the filing of the Third Account as follows:

- If a one-year account is required, Monday, March 6, 2017.
- If a two-year account is required, Monday, March 5, 2018.

If the proper item is filed, status hearing may come off calendar. Otherwise, written status report is required per Local Rule 7.5.

10 Marcus Thomas Areyano (Estate)**Case No. 14CEPR00811****Attorney: Gary G. Bagdasarian (for Petitioner/Administrator Lanae Areyano)**

Waiver of Accounting and Report of Administrator and Petition for its Settlement; Waiver of Administrator's Commissions; for Allowance of Statutory Attorney's Fees, and Costs Reimbursement, and for Final Distribution

DOD: 3/25/14		LANAE AREYANO , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Cont. from 020816, 031416		I & A - \$162,275.45	
		POH - \$160,139.15	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Administrator - Waives	
<input checked="" type="checkbox"/>	Inventory	Attorney (statutory) - \$5,868.00	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Costs - \$1,752.00	
<input checked="" type="checkbox"/>	Notice of Hrg	(filing fees, probate referee, publication, certified copies and bond)	
<input checked="" type="checkbox"/>	Aff.Mail	W/ Closing - \$639.15	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen		Lanae Areyano – 1/3 interest in real property located in Fresno, 1/3 interest in 2010 Honda Civic and 1/3 interest in personal property and effects.	
<input checked="" type="checkbox"/>	Letters	11/4/14	
Duties/Supp			
Objections		Emily Areyano – 1/3 interest in real property located in Fresno, 1/3 interest in 2010 Honda Civic and 1/3 interest in personal property and effects.	
Video Receipt			
CI Report			
<input checked="" type="checkbox"/>	9202	Laura Castillo, as guardian of the Estate of Joshua Areyano – 1/3 interest in real property located in Fresno, 1/3 interest in 2010 Honda Civic and 1/3 interest in personal property and effects.	
<input checked="" type="checkbox"/>	Order		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/11/16
			Updates:
			Recommendation: SUBMITTED
			File 10- Areyano

11

12 Nabella Evangelina Varela (GUARD/P)**Case No. 14CEPR01034**

Guardian: Evangelina Louise McNulty (Pro per – Paternal grandmother)

Guardian: Dale Wayne McNulty, SR (Pro per – Step-grandfather)

Petitioner: Latisha Doloris (Pro per – Mother)

Petition for Visitation

Age: 1.5 years		LATISHA DOLORIS , mother, is petitioner EVANGELINA McANULTY and DALE McANULTY, SR , paternal grandmother and paternal step-grandfather, were appointed co-guardians of the minor on 1/0/2015. OBJECTIONS TO PETITION filed on 3/24/2016 and 3/30/2016 by Evangelina McNulty and Dale McNulty Sr. (co-guardians). <i>See petition for details.</i>	NEEDS/PROBLEMS/COMMENTS: Petitioner: 1. <i>Notice of Hearing</i> filed 4/14/16 by Latisha Doloris is incomplete. It does not state what document was filed at #1 nor the department or address of the court where the hearing is to be held at #4b. 2. Need proof of service 15 days before the hearing of <i>Notice of Hearing</i> on: a. Evangelina McNulty (co-guardian) b. Dale McNulty (co-guardian) Objectors: 1. Need proof of service of objections on Latisha Doloris (mother/petitioner).
DOB: 8/12/14			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: SEF Reviewed on: 4/12/2016 Updates: 4/14/2016 Recommendation: File 12- Varela	

Report of Sale and Petition for Order Confirming Sale of Real Property

		KENNETH KEARNS , Conservator with bond of \$95,416.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: On 3/16/16, the Court confirmed the sale of another property and ordered additional bond of \$165,000.00 (for a total bond of \$260,416.00); however, that additional bond has not yet been filed. See Page A. 1. The sale price of \$155,000 is only 77% of the appraised value of \$200,000. Pursuant to Probate Code §10309(a)(3), no sale shall be confirmed by the Court unless the sum offered is at least 90% of the appraised value. 2. Notice of Hearing was not sent to the Conservatee Jean Walters directly pursuant to Probate Code §1460(b)(2) and Cal. Rule of Court 7.51(c). Note: Declaration filed 4/15/15 states the Conservatee's address is known, but is confidential. Because Mr. Kearns has already been given authority to sell the real property, it is requested that no additional notice be required to be given to the Conservatee and that the Court dispense with notice per §1460(e). Note: The Court will set a status hearing for the filing of the additional bond in the amount of \$140,000.00 (for a total bond of \$400,416.00) as follows: <ul style="list-style-type: none"> Monday, May 23, 2016 Note: The hearing on the Public Guardian's First and Final Account as Temporary Conservator was continued to Monday May 2, 2016.
		Sale price: \$155,000.00 Overbid: \$163,250.00	
		Appraisal: \$200,000.00	
	Aff.Sub.Wit.	Property: 4551 N. Fruit, Fresno, 93705	
✓	Verified	Buyer: TGP Investments, LLC	
✓	Inventory	Broker: 5% or \$7,750 payable to 2.5% or \$3,875 each to Guarantee Real Estate and Goldleaf Real Estate.	
	PTC	Petitioner states the property was listed commencing 11/11/15 and the current offer is the highest and only bid received.	
	Not.Cred.	See petition re terms of sale.	
✓	Notice of Hrg	Petitioner states additional bond of \$140,000.00 will be needed.	
✓	Aff.Mail	Declaration of Jeff Starbuck filed 4/15/16 states he is the agent associated with the listing brokerage. He previously filed a declaration in connection with the sale of the other property at 4552 N. Delno. The statements in that declaration filed 3/8/16 regarding the substandard issues, poor maintenance and repairs, and structural problems of the properties are incorporated into this declaration. With regard to 4551 N. Fruit, the appraised value of \$200,000 was too high in light of the multiple physical problems which reduce its marketability and value. Issues include roof, wood rot, flooring and paint, windows and doors, fencing. The property had been listed for 110 days and the only formal offers received were from the current pending buyers, TGP Investments, which originally offered \$150,000. Conservator counteroffered \$180,000, and the buyer presented a "best" offer of \$155,000, which was accepted. No backup offers have been received. Mr. Starbuck feels the agreed sales price is reasonable and should be approved by this Court.	
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
✓	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Petitioner Verduzco, Joaquin (Pro Per – Step-Father)

Attorney Lovegren-Tipton, Amy R. (for Sandra Kozorra – Objector -Maternal Grandmother)

Petition for Appointment of Guardianship of the Person

Amarisa Age: 13		<u>TEMPORARY EXPIRES 04/18/2016</u> JOAQUIN VERDUZCO, step-father, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: <u>Page 14B</u> is consideration of the <i>Stipulation and Proposed Order Regarding Visitation with Sandra Kozorra.</i> Minute Order of 02/01/2016: Sandra Kozorra withdraws her objection. Counsel represents that parties have reached an agreement, and the Court orders that any agreement is to be reduced to writing, filed with the Court, and properly served. The Court deems the 13 days notice as substantial compliance, and finds the service to Justin Tidey sufficient. Jason Boulware still needs to be personally served. Additionally, Deena Kozorra indicates that Krysta has Native American Ancestry, and Mr. Verduzco is directed to obtain the required ICWA forms and complete them. As of this Examiner's review the ICWA forms have not been completed. <u>Continued on additional page</u>
Krysta Age: 11			
Cont. from 091415, 110215, 120715, 020116			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Reviewed by: LV Reviewed on: 04/11/2016 Updates: 4/14/16 (LEG) Recommendation: File 14A - Kozorra	
✓	Aff.Mail		w/
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		x
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS continued:

1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice for:
 - Jason Ray Boulware (Father of Amarissa), **if Court does not find due diligence per Declaration filed 4/14/2016.**
2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Paternal Grandparents (of Amarissa) – Unknown
3. UCCJEA is incomplete. Need minors' residence information for the past 5 years.
4. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the children have Native American Ancestry was not completed. Need declaration with page #5 attached for each of the minors.
5. Pursuant to the Minute Order of 02/01/2016, Deena Kozorra indicated that Krysta has Native American Ancestry therefore, a *Notice of Child Custody Proceeding for Indian Child* (Form ICWA-030), must be served together with copies of petition and all attachments, including this form, on the child's parent; any Indian custodian; any Indian tribe that may have a connection to the child; the Bureau of Indian Affairs (BIA), and possibly the U.S. Secretary of the Interior, by certified or registered U.S. Mail, return receipt requested. (Please see Probate Code 1460.2, and CA Rules of Court 7.1015)
6. Per item 5 above, Petitioner will need to return the completed copy of the *Notice of Child Custody Proceeding for Indian Child* to the probate clerk. The probate clerk will then mail the notice to the required agencies as required.
7. After mailing, per item 6 above, need proof of service of notice, including copies of the notices sent and all return receipts and responses received, pursuant to Probate Code 1460.2(d).

Note: A blank copy of the *Notice of Child Custody Proceeding for Indian Child* (Form ICWA-030) is in the file to hand to petitioner at the hearing. Petitioner should complete the form and return it to the probate clerk for mailing.

14B Amarrisa Kozorra and Krysta Kozorra (GUARD/P) Case No. 15CEPR00678

Attorney Amy R. Lovegren-Tipton (for Objector Sandra Kozorra, maternal grandmother)
Petitioner Joaquin Verduzco (Pro Per Petitioner, step-father)

**Stipulation and Proposed Order Regarding Visitation of Minor Children
with Sandra Kozorra**

		JOAQUIN VERDUZCO , step-father, filed a <i>Petition for Appointment of Guardian</i> on 7/14/2015.	NEEDS/PROBLEMS/COMMENTS:
		SANDRA KOZORRA , maternal grandmother, filed <i>Objections</i> on 11/12/2015.	
Cont. from		Minute Order dated 2/1/2016 from the last hearing states, in pertinent part: Sandra Kozorra withdraws her objection. Counsel represents that parties have reached an agreement, and the Court orders that any agreement is to be reduced to writing, filed with the Court, and properly served.	
Aff.Sub.Wit.			
Verified		Stipulation and Proposed Order Regarding Visitation of Minor Children with Sandra Kozorra was filed 4/13/2016 , seeking the Court's approval and signature on the proposed <i>Order Regarding Visitation of Minor Children with Sandra Kozorra</i> .	
Inventory			
PTC		Order on the Stipulation filed 4/13/2016 finds the <i>Stipulation</i> will be considered at the hearing on 4/18/2015, as approval and signature on the <i>Stipulation</i> is premature given that a general guardianship is not yet established.	
Not.Cred.			
Notice of Hrg	X	Stipulation contains the following orders: ~See Stipulation for Details~	
✓ Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: LEG
Reviewed on: 4/14/16
Updates:
Recommendation:
File 14B- Kozorra

14B

Attorney Gary G. Bagdasarian (for Petitioner Connie Mekealian)

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 2/27/2014		CONNIE MEKEALIAN , niece and Administrator appointed with Limited IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Sale Price - \$50,000.00	<p>1. <i>Petition for Probate</i> filed 9/28/2015 indicates the address is unknown for two of the Decedent's sons. The Proof of Service by Mail filed 3/14/2016 for the Report of Sale shows notice to the following persons was sent C/O another person (ELENA BIALZA), in violation of CA Rule of Court 7.51(a)(1) and (2), which provides that notice must be mailed individually and directly to the person entitled to notice, and notice mailed in care of another person is insufficient unless the person entitled to notice is an adult and has directed in writing that the notice be sent in care of the second person:</p> <ul style="list-style-type: none"> • RANDY MEKEALIAN, son; • JAMES MEKEALIAN, son. <p>--Declaration filed 4/14/2016 states Decedent's sons are residents of CVRC and notice was provided to their contact worker. Proof of service by mail to each individually was filed 4/14/2016.</p> <p>~Please see additional page~</p>
		Overbid - \$53,000.00	
Cont. from		Reappraisal - \$42,500.00 (completed 1/25/2016)	
<input checked="" type="checkbox"/>	Aff.Sub.Wit.	Property - 50% interest in unimproved property at 46 S. Quality Ave., Sanger, CA	
<input checked="" type="checkbox"/>	Verified	Publication - Business Journal	
<input checked="" type="checkbox"/>	Reappraisal	Buyers - Sunara, LLC, A California Limited Liability Company	
<input type="checkbox"/>	PTC	Broker - \$2,500.00 (5% payable to Realty Concepts)	
<input type="checkbox"/>	Not.Cred.	Bond - \$60,000.00 - needed	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 4/12/16
			Updates: 4/15/16
			Recommendation:
			File 15- Mekealian

NEEDS/PROBLEMS/COMMENTS, continued:

2. The following discrepancies are noted in the *Report of Sale* filed 3/10/2016 and the *Reappraisal for Sale* filed 2/2/2016:
- Item 2 of the *Report of Sale* filed 3/10/2016 lists the APN of the subject real property on 46 S. Quality Avenue in Sanger as **314-070-83**, while Attachment 4(f) of the *Report of Sale* and the *Reappraisal for Sale* both list the APN as **314-070-10**;
 - The legal description included on Attachment 2(e) of the *Report of Sale* indicates **4.37** acres of land, while the *Reappraisal for Sale* and the *Final Inventory and Appraisal* filed 1/13/2016 both list **437** acres.

--Declaration filed 4/14/2016 states the correct APN is 314-070-83, and correct acreage is 4.37.

Note: Court will set status hearing as follows:

- **Thursday, May 19, 2016 at 9:00 a.m. in Dept. 303** for filing proof of **\$60,000.00** bond by the Administrator.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 9/16/2015	MEGAN DAVIS , daughter, was appointed Administrator with full IAEA without bond on 11/16/2015.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued 11/16/2015.	
Cont. from	<u>Minute order dated 11/16/2015</u> set this status hearing re: the filing of the inventory and appraisal.	1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report shall be served on all necessary parties.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt	Reviewed by: SEF	
UCCJEA	Reviewed on: 4/12/2016	
Citation	Updates:	
FTB Notice	Recommendation:	
	File 16- Davis	

17A Paige Jean Gross (Estate) Case No. 15CEPR01198**Petitioner Garcia, Kevin Michael (Pro Per – Petitioner)****Attorney Sullivan, Ryan P. (for Seth Wooden, Tyler Rinker, Kylie Rinker – Competing Petitioners)****Petition for Letters of Administration: Authorization to Administer under IAEA**

DOD: 07/04/2015	KEVIN MICHAEL GARCIA , is petitioner and requests appointment as Administrator with bond set at \$5,000.00.	NEEDS/PROBLEMS/COMMENTS: 17B is the competing amended petition filed by Seth Wooden, Tyler Rinker, and Kylie Rinker, decedent's children. Minute Order of 03/14/2016: Mr. Sullivan represents that he received an email from a party on behalf of Petitioner Kevin Garcia stating that Mr. Garcia did not wish to proceed. Mr. Sullivan has sent him a declination/nomination, but it has not yet been returned. <ol style="list-style-type: none">1. Petitioner requests bond in the amount of \$5,000.00 however the estimated value of the estate is \$152,500.00. Need bond in the amount of \$152,500.00.2. Petitioner is not listed on #8 of the petition as required and it is unclear what the relationship is to the decedent.3. #5a(3) or #5a(4) was not answered regarding a registered domestic partner.4. #5a(7) or #5a(8) was not answered regarding issue of predeceased child.5. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. Please see additional page
Cont. from 020816, 031416	Full IAEA – o.k. Decedent died intestate	
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno Publication: The Business Journal	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Estimated value of the Estate:	
<input type="checkbox"/> Not.Cred.	Personal property - \$25,000.00	
<input checked="" type="checkbox"/> Notice of Hrg	Real property - \$160,000.00	
<input checked="" type="checkbox"/> Aff.Mail	(Less encumbrances - \$32,500.00)	
<input checked="" type="checkbox"/> Aff.Pub.	Total - \$152,500.00	
<input type="checkbox"/> Sp.Ntc.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Pers.Serv.	Petitioner states: he filed for Probate on 08/06/2015 after discovering that no other petition on behalf of the decedent had been filed. During the 09/08/2015 hearing the County of Fresno Public Administrator's Office declined appointment as Special Administrator. Issues of the decedent, who were present for the hearing stated on the record that they would file a new or amend the existing petition for Probate and that a Will exists, yet they have failed to do so. If a Will does exist, any executor in such alleged will has failed to petition the Court for administration of the Estate within 30 days of the death of the decedent and therefore has waived the right to appointment as personal representative pursuant to Probate Code §8001.	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Reviewed by: LV
Reviewed on: 04/11/2016
Updates:
Recommendation:
File 17A-Gross

17A

17A(additional page) Paige Jean Gross (Estate) Case No. 15CEPR01198

Note: If the petition is granted status hearings will be set as follows:

- **Monday, 05/16/2016 at 9:00a.m. in Dept. 303** for the filing of the bond **and**
- Monday, 10/17/2016 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Monday, 06/19/2017 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Dept. 303, 9:00 a.m. Monday, April 18, 2016

17B Paige Jean Gross (Estate) Case No. 15CEPR01198
Attorney Sullivan, Ryan P (of Visalia for Seth Wooden, Tyler Rinker, Kylie Rinker – Petitioners)
Petitioner Garcia, Kevin Michael (Pro Per – Competing Petitioner)

Amended Petition for Letters of Administration and Authorization to Administer under IAEA

DOD: 07/04/2016		SETH WOODEN, TYLER RINKER, and KYLIE RINKER , children, are petitioners and request SETH WOODEN be appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 031416		Full IAEA – ?	1. Need Affidavit of Publication. 2. Need Waivers of Bond on Mandatory Judicial Council Form or Bond in the amount of \$152,500.00.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Decedent died intestate	<p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Monday, 05/16/2016 at 9:00a.m. in Dept. 303 for the filing of the bond <u>and</u> • Monday, 10/17/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Monday, 06/19/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	Inventory	Residence: Fresno	
<input type="checkbox"/>	PTC	Publication: Need	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<u>Estimated value of the Estate:</u>	
<input checked="" type="checkbox"/>	Aff.Mail	Personal property - \$25,000.00	
		Real property - \$160,000.00	
		(Less encumbrances - \$32,500.00)	
	Aff.Pub.	Total - \$152,500.00	
	Sp.Ntc.		
	Pers.Serv.	Probate Referee: Steven Diebert	<p>Reviewed by: LV</p> <p>Reviewed on: 04/11/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17B- Gross</p>
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

17B

Dept. 303, 9:00 a.m. Monday, April 18, 2016

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 4/18/16	NEEDS/PROBLEMS/COMMENTS:	
		PATRICIA CASTANEDA , maternal grandmother, is petitioner.		
Cont. from		Please see petition for details.		
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	ICWA			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report		X	
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 4/12/16	
			Updates:	
			Recommendation:	
			File 18- Castaneda & Vassar	

19 Abram Canul (GUARD/P)**Case No. 16CEPR00159**

Petitioner: Efren R. Sanchez (Pro per – Paternal uncle)

Petitioner: Lourdes E. Sanchez (Pro per – Paternal aunt)

Petition for Appointment of Guardian of the Person

		TEMPORARY NOT REQUESTED	NEEDS/PROBLEMS/COMMENTS:	
		EFREN SANCHEZ and LOURDES SANCHEZ, paternal aunt and uncle, are petitioners	1. Need Notice of Hearing. Filed 4/15/16.	
		Court Investigator report filed 4/11/16.	2. Need proof of personal service 15 days before the hearing of Notice of Hearing with copy of petition or consent and waiver of notice for:	
Cont. from		See petition for details.	a. Danetta Coleman (mother) personal service 3/23/16	
<input type="checkbox"/>	Aff.Sub.Wit.		3. Need proof of mailed service 15 days before the hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: a. Paternal grandfather b. Amalia Canul* (paternal grandmother) c. Maternal grandfather d. Pam W. Hopkins* (maternal grandmother) *Note: Proof of mailed service of Notice of Hearing filed 4/15/16 is incomplete; #4 is blank re: the date mailed.	
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 4/12/2016	
			Updates: 4/15/16	
			Recommendation:	
			File 19- Canul	

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 1/1/16		KATHERINE SHANNON NOBLE , named Executor without bond, is petitioner. Full IAEA – o.k. Will dated: 8/2/74 Codicil dated 4/10/00 and amended 1/27/12. Residence: Fresno Publication: Fresno Business Journal Estimated value of the Estate: Personal property - \$ 30,000.00 Real property - \$ 80,000.00 Total - \$120,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: Note: If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, September 21, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, June 28, 2017 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from			
Aff.Sub.Wit.	s/p		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
✓ Aff.Mail	W/		
✓ Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: KT
Reviewed on: 4/12/16
Updates:
Recommendation: SUBMITTED
File 20- Noble

Petition for Appointment of Temporary Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS: San Luis Obispo County Court Investigator advised rights on 4/13/16. <u>SEE ADDITIONAL PAGES</u>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 4/12/16 Updates: 4/14/16 Recommendation: File 21- Swanson

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner states the proposed Conservatee is currently in Morro Bay, CA, which is in San Luis Obispo County. Need clarification re Fresno as proper venue for conservatorship action.
2. Petitioner indicates that all of the proposed Conservatee's assets are held in trust and appears to be requesting authority to continue to act as co-trustee; however, the trust is separate from the jurisdiction of this conservatorship action. It appears a petition under Probate Code §17000 may be more appropriate for access to funds held in trust. The conservatorship estate would consist of assets not held in trust. The Court may require clarification and authority for access to trust funds within this conservatorship proceeding.
3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on Proposed Conservatee Renate Lina Swanson pursuant to Probate Code §2250(e).

Note: Notice of Hearing filed 4/13/16 reflects service on Renate L. Swanson "C/O Leigh Burnside;" however, personal service on the proposed conservatee is required per Probate Code §2250(e) and Cal. Rule of Court 7.51, and the Court has not otherwise been informed that Ms. Burnside represents the proposed Conservatee. The Court may require clarification.

4. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on relatives listed in the petition pursuant to Probate Code §2250(e)"
 - Stewart Reichardt (son)
 - Suzanne Abrahamson (daughter)
 - Jared Reichardt (grandson)
 - Katrina Reichardt (granddaughter)
 - Miles Abrahamson (grandson)
 - Alexis Abrahamson (granddaughter)
 - Pierce Abrahamson (grandson)
 - Joshua Boyer (grandson)
 - Nicholas Ryan (grandson)
5. If Petitioner had access to all liquid assets described, the bond required pursuant to Probate Code §2320 and CRC 7.207 would be at least \$2,272,800.00. It appears Petitioner is requesting the Court allow access to only \$150,000.00 for maintenance as described in the petition, which would require bond of at least \$165,000.00. The Court may require clarification as to the logistics of how access to various funds would be blocked, given that assets are held in trust.
6. Need completed proposed order per Local Rule 7.1.1.F. (The order submitted is incomplete.)

Petitioner: Rhonda Bopp (Pro per – Paternal grandmother)

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 6/7/2016	NEEDS/PROBLEMS/COMMENTS:
		RHONDA BETH BOPP , paternal grandmother, is petitioner	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified	See petition for details.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	N/A	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 4/12/2016
			Updates:
			Recommendation:
			File 22- Dillinger

Petitioner: Patricia Asher (Pro per – Maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person

GENERAL HEARING 6/7/2016			NEEDS/PROBLEMS/COMMENTS:
PATRICIA ASHER, maternal grandmother, is petitioner			<p>1. Need <i>Notice of Hearing</i>.</p> <p>2. Need proof of personal service at least 5 court days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice on:</p> <p style="margin-left: 40px;">a. Thomas (minor)</p> <p style="margin-left: 40px;">b. Precious (minor)</p> <p>3. Petitioner requests to be excused from giving notice to mother and both fathers of minors. If court does not excuse notice need proof of personal service at least 5 court days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice for:</p> <p style="margin-left: 40px;">a. Santiago Hernandez (father of Thomas)</p> <p style="margin-left: 40px;">b. Manuel Pardo (father of Precious)</p> <p style="margin-left: 40px;">c. Melissa Hughes (mother)</p> <p>4. UCCJEA is incomplete. Need residence information for both minors from February 2011 through 2/29/2016.</p>
See petition for details.			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
✓	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	x	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
✓	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: SEF			
Reviewed on: 4/13/2016			
Updates:			
Recommendation:			
File 23- Pardo			

Attorney Bell, Melinda, of San Juan Capistrano (for Petitioners Lee Ann Hitchman and Bruce Hitchman, Trustees)

Petition for Instructions and Authority for Trustee to Purchase Accessible Vehicle and Pay Caregiver

		<p>LEE ANN HITCHMAN and BRUCE HITCHMAN, licensed professional fiduciaries and Co-Trustees of the GAVIN KATIGBAK SPECIAL NEEDS TRUST, are Petitioners.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p><i>Verified Supplement to Petition for Instructions and Authority for Trustee to Purchase Accessible Vehicle and Pay Caregiver was filed 4/13/2016.</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/13/2016. Minute Order states counsel is directed to submit the three vehicle quotes she has obtained, via e-filing today. Counsel will also submit information regarding the approximated payments for caregivers.</p> <p>Note: First Account approved on 7/30/2015 shows an ending property on hand as of 4/30/2015 of \$134,879.41 cash and a future annuity beginning 7/3/2021 totaling \$650,000.00 from wrongful death litigation. This SNT was consolidated with 15CEPR00061 (<i>Matter of Gavin Katigbak</i>), from which the SNT received additional settlement funds that are reflected in the aforementioned cash amount. Based upon the approved fees from the <i>First Account</i>, it appears the cash on hand is ~\$126,555.91.</p> <p>1. Need proposed order pursuant to Local Rule 7.1 which provides a proposed order shall be submitted with all pleadings that request relief.</p> <p align="center"><i>~Please see additional page~</i></p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: LEG		
		Reviewed on: 4/14/16		
		Updates:		
		Recommendation:		
		File 24- Katigbak		

Attorney Robert L. Howk (for Petitioner Mary Jane Sunamoto, Executor)

Probate Status Hearing Re: Informal Account of Closing Reserve

DOD: 9/6/2013	MARY JANE SUNAMOTO , niece and Executor, filed a <i>First Account and Report of Executor, Petition for its Settlement, and Petition for Final Distribution, for Allowance of Compensation to Executor and Attorneys for Ordinary Services</i> on 9/4/2015.	NEEDS/PROBLEMS/COMMENTS: Note: Continuance of this status hearing pending the filing of the final informal account of \$10,000.00 closing reserve may result in the status hearing coming off calendar upon the filing with the Court of the final informal account.
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
✓ Verified	Order Settling the First Account and Report of Executor filed 10/15/2015 authorized the Executor to retain \$10,000.00 in cash from distribution to defray closing expenses.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Court set a status hearing on 4/18/2016 for filing of an informal accounting of the closing reserve.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report filed 4/8/2016 states, in brief sum:	
Letters 050814	<ul style="list-style-type: none"> Upon approval of the Petition for Final Distribution, Petitioner distributed the proceeds as follows: <ul style="list-style-type: none"> Payment to Executor for fees and costs of \$9,154.39; Payment to Executor for fees and costs of \$8,339.89; Payment to creditor Arlene Mendoza as Trustee of the 2002 LUNA FAMILY TRUST of \$23,858.32; Payment to Department of Health Care Services of \$213,949.10; Petitioner reserved \$10,000.00 for closing expenses; 	
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
✓ Status Rpt	<ul style="list-style-type: none"> Petitioner is still working with the Department of Health Care Services regarding the claim that they have against the 2007 MARY LUNA REVOCABLE LIVING TRUST; Petitioner anticipates to have the issue with Medi-Cal resolved by 6/30/2016; The balance of the closing reserve in the Estate account is \$9,974.59; Petitioner is waiting to receive one more statement from the bank before filing an informal accounting with the Court, which Petitioner anticipates will be completed by 4/14/2016. 	
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LEG
Reviewed on: 4/14/16
Updates:
Recommendation:
File 25 – Luna